

# Gift of Raymond James Brokerage Assets

**RAYMOND JAMES Charitable**

**RJ Charitable  
Service Center**  
*eSign* / Scan / Fax

**0 2 7 8 3**

Form #

FA #

Branch #

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**Please use this form to transfer assets held in your Raymond James brokerage account.**

This form must be signed by all owners of the brokerage account.

**IMPORTANT:** Scan all pages of this form and upload to Service Center once you have completed a new account application (on our website or through service center, form #02781). Please verify that the brokerage account is not pledged before submitting.

\_\_\_\_\_  
Brokerage Account Name

\_\_\_\_\_  
Raymond James Brokerage Account Number

\_\_\_\_\_  
Daytime Phone Number

**AS MY/OUR IRREVOCABLE GIFT TO THE RAYMOND JAMES CHARITABLE ENDOWMENT FUND, PLEASE TRANSFER FROM THE ABOVE ACCOUNT THE CASH OR SECURITIES LISTED BELOW TO THE RAYMOND JAMES CHARITABLE ACCOUNT #60137199 (OR #11192413 FOR POOLED INCOME FUND ACCOUNTS).**

FOR FURTHER CREDIT TO \_\_\_\_\_ (# \_\_\_\_\_)  
Raymond James Charitable Account Name Account # (leave blank if new)

Number of Shares	Name of security issuer	Symbol	Acquisition date(s)	Maturity date of bond
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- |          |       |       |       |       |
|----------|-------|-------|-------|-------|
| 1. _____ | _____ | _____ | _____ | _____ |
| 2. _____ | _____ | _____ | _____ | _____ |
| 3. _____ | _____ | _____ | _____ | _____ |
| 4. _____ | _____ | _____ | _____ | _____ |
| 5. _____ | _____ | _____ | _____ | _____ |

If contributing more than five different positions, please provide information in a separate document, sign and submit along with this form.

If securities being contributed have been held short-term, please note here with your approval to proceed. \_\_\_\_\_

\_\_\_\_\_  
Signature of donor and Raymond James account owner

\_\_\_\_\_  
Signature of co-donor and Raymond James account co-owner

\_\_\_\_\_  
Please print donor's name

\_\_\_\_\_  
Please print co-donor's name

\_\_\_\_\_  
Signature of branch manager

\_\_\_\_\_  
Branch phone number

\_\_\_\_\_  
Date

Please contact [RJCHARITABLE@RAYMONDJAMES.COM](mailto:RJCHARITABLE@RAYMONDJAMES.COM) or 866-687-3863 or ext. 77221 with any questions.

Registration # CH11828

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE.

Under policies of Raymond James Charitable, and in accordance with the anti-money laundering regulations applicable to the financial institutions that provide financial services to Raymond James Charitable, we obtain, record, and may verify information that identifies each person and entity who establishes a fund within Raymond James Charitable, and other people and entities who contribute or have access to the fund established. Raymond James Charitable and Raymond James Trust, N.A., as its service provider, will ask for the name, address, Social Security number, date of birth, and other information that will allow us to identify people associated with the fund. We may also ask to see driver's licenses or other identifying documents, and we may verify the information obtained.